


~~On January 2009~~ Thursday November 29th I was discriminated against and faced disparate treatment during my FY18 performance appraisal by the CFO. During my performance appraisal, the CFO Holly Greaves and the DCFO Mr. David Bloom, and the ACFO were all present. David Bloom started my evaluation



I used personal recognition of employee successful milestones as an example. I cited a case where the CFO Holly Greaves went over to the 8th floor to recognize to the Office of Controller staff for their work on the financial statement. While the OTS staff works weekends and overtime to complete 150 steps in support of this effort,



[REDACTED]

Under the leadership and Direction of the Chief Financial Officer, Holly Greaves, the organization continues a culture of discrimination and disparate treatment. My white manager peers continue to receive preferential and disparate treatment. The CFO, Holly Greaves has held individual meetings with other Office Directors, however, has not held any meetings with me.

[REDACTED]

Since 2013, the Office of Budget has **never** submitted a change request, data change, or defect via the OCFO change control process. As outlined in the chart below, my office has submitted over 4800 of these documents via the change control process.

Total Requests	
from 2013 to 12/3/2018	
Open	Count
Change Request	1,163.0
Data Change	374.0
Defect Resolution (DEF)	697.0
Sub - Total	2,234.0
Completed	
Change Request	1,505.0
Data Change	349.0
Defect Resolution (DEF)	762.0
Sub - Total	2,616.0
Summary	
All Change Request	2,668
All Data Change	723
All Defect Resolution (DEF)	1,459
Grand Total	4,850
Legend:	
Open = currently in the CM workflow.	
Completed = deferred, withdrawn or in production.	

Additionally, the Office of Budget project manager is not required to provide infrastructure health check reports; outcome of stakeholder meetings; or security updates. My Office has reported on over 36 health checks; 225 stakeholder meeting reports; and 209 security MOU and ISA updates. The CFO, Holly Greaves has been briefed on this information. Finally, as a result of delays in the BFS project implementation, my office is now assisting the Office of budget project manager by implementing the payroll projection module (PAM project) of BFS and the performance dashboard component of BFS. While the CFO Holly Greaves is fully aware of this unfair distribution of workload, the project management oversight responsibilities impacts my office's ability to meet internal control requirements and deliver completed project results.

At the November 19th OCFO Staff meeting with the CFO Holly Greaves, [REDACTED]

[REDACTED] Following the staff meeting, the
Office of Budget, Deputy Director Maria Williams stayed behind after to
discuss the issue with the CFO Holly Greaves. [REDACTED]

[REDACTED]

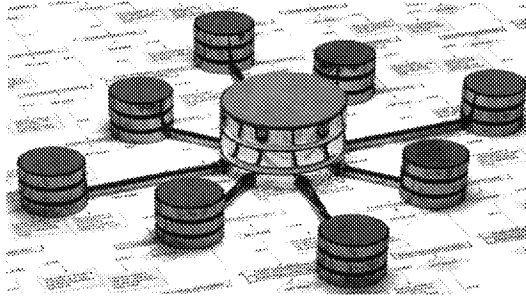
below.

Data Warehousing Support at EPA

KeyLogic helped develop a business reporting environment with dozens of ways for the EPA Office of the Chief Information Officer to filter information and generate reports—quickly and accurately.

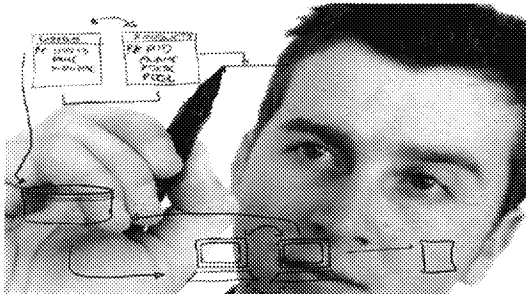
KeyLogic Brings IT Consulting and Database Architecture Experience

The Client: The U.S. Environmental Protection Agency's (EPA) Office of the Chief Financial Officer (OCFO) manages the agency's annual budget process and oversees financial operations. Its work enables the EPA's core mission of protecting health and the environment.



The Challenge: The OCFO's Office of Technology Solutions (OTS) had several database systems feeding multiple data repositories used for enterprise reporting. Ensuring quick, accurate data retrieval and comparison of important budget and financial data across the agency was challenging.

The Solution: Partnering with a large IT provider, KeyLogic was part of OCFO's application integration team. It served two roles — consultant and database architect. As a consultant, KeyLogic evaluated OCFO IT projects, conducted research to gather important information about the as-is state, and recommended to be solutions conforming to industry recognized best practices. As a database architect, KeyLogic designed and built a multi-dimensional central data repository for budget and financial information. The OCFO now has a better structured data source, and its reporting tools more efficiently capture agency budget and spending over a wide spectrum of categories.



Quick List of KeyLogic Experience

CFO Datawarehousing

Related Contract Vehicles

ISRA IT Schedule 70

EPA HPMSS

Testimonials

"Just want you to know how lucky we are to have you on our team. We definitely could not do this mess without you!"

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Contact KeyLogic

888.204.9649

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In November of 2018, the OCFO Office of budget released a project work statement (see below) via General Services Administration [REDACTED] work [REDACTED]

[REDACTED] The Office of Budget or the Office of the Chief Financial Office overall does not have a requirement for this type of technology implementation. This effort was not approved by OCFO SI or CCB and is not identified in the OCFO IT roadmap. This work is also not identified scope of work for the Budget Formulation System Project. Putting this requirement within the performance work statement as fictitious contractual need would give [REDACTED] a competitive advantage over other vendors competing for the work. CFO Holly Greaves was made aware of this contract violation and chose to ignore the inappropriate behavior. As a result the Office of budget is allowed to meet performance objectives without contract disruption. As a result of the discriminatory disparate treatment by the CFO Holly Greaves, the Office Director is allowed to increase the performance rating and standards and this highly inappropriate contract behavior goes without discipline or reprimand to the Office Director overseeing the project.

Attachments:



**US General Services Administration
Federal Acquisition Service
Contracting Division
Sources Sought Notice
On Behalf of the Environmental Protection Agency (EPA)**

Date: November 13, 2018

Source Sought Notice

Contracting Office: U.S. General Services Administration (GSA)
Federal Acquisition Service (FAS)
Contracting Division (9QZAA)
Pacific Rim Region (R9)

From: Fred Hersom, Contracting Officer, GSA, Federal Acquisition Service

To: GSA Multiple Award Schedule 70 Information Technology (IT)

Project Title: Environmental Protection Agency (EPA), Office of Chief Financial Officer (OCFO) – Custom Computer Programming

NOTICE:

This Sources Sought Notice is being issued solely for information and planning purposes. It **does not** constitute a Request for Quote (RFQ) or a promise to issue an RFQ in the future. This Sources Sought Notice does not commit the Government to a contract for any supply or service whatsoever. Furthermore, the Government is not at this time seeking quotations and will not accept unsolicited quotations. Responders are advised that the Government will not reimburse for any information or administrative costs incurred in response to this Sources Sought Notice; all costs associated with responding to this Sources Sought Notice will be solely at the interested parties' expense. Not responding to this Sources Sought Notice does not preclude participation in a future RFQ, if one is issued.

MARKET RESEARCH:

This Sources Sought Notice is seeking responses from businesses that can provide the required service under the MAS IT Schedule 70. The data obtained from this Sources Sought Notice will assist the Government in understanding the capabilities available in the industry marketplace and to inform the development of a way-ahead for GSA to obtain support services on behalf of the OCFO within the EPA. Additionally, the market research will assist the Government in determining which acquisition strategy can be used to best meet the requirements. GSA intends on determining the availability within GSA MAS IT Schedule 70.

Sources Sought EPA
Information Technology (IT) – Custom Computer Programming Services

Page 1 of

GSA is seeking industry feedback on the attached draft PWS and draft Bid Schedule.

CONTRACTUAL HISTORY

Current contract info:

Contract Number: GS-35F-0151L
GSA Order Number: 47QFPA18F0009
Type of Award: Exception to Fair Opportunity
Awardee: Key Logic Systems, Inc.
Dollar Value: Currently \$3.1 million
Contract Vehicle Used: GSA Schedule 70
Contract Type: Time and Materials (T&M)
Period of Performance: 01/15/2018 – 03/14/2019

Previous Contract Informations:

EPA provided the following contractual history:
Existing effort:
Contract: GS-35F-0151L
Issued by: EPA
Issued to: KeyLogic Systems, Inc
EPA Budget Automation System
Period of Performance: 07/15/2012 to 01/14/2018
Award: \$17,107,695.01
EPA has extended the period of performance by maximum amount of 6 months to end on 1/14/2018.
FAR 52.216-1 This is a fixed rate

SCOPE OF WORK (For full specification see the draft Performance Work Statement (PWS):
Please note that there are several optional line items that may or may not be exercised over the course of the contract based upon up to four other Agencies agreeing to utilize the contract for financial system IT support (see the draft PWS).

EPA is requesting assistance to provide improved management and access of its records and data by supporting EPA's Office of the Chief Financial Officer (OCFO), Office of Budget (OB) in the modification and maintenance of the Agency's budget systems. The budget systems are used as a centralized information technology tool during EPA's budget planning, formulation, and execution processes. The system links budget and performance data in support of EPA's efforts to comply with the requirements of the Government Performance and Results Act (GPRA). EPA's budget personnel also use the data to generate EPA's budget submission to the Office of Management and Budget (OMB) and Congress, prepare operating plans, and monitor budget execution.

The technical requirements for this task order are described in Section 3.0 TECHNICAL REQUIREMENTS of the draft PWS. The work is primarily Information Technology (IT).

Sources Sought EPA
Information Technology (IT) – Custom Computer Programming Services

Budget Formulatio

PERFORMANCE WORK STATEMENT (PWS)

ID09180115 – Information Technology (IT) – Custom Computer Programming Services

- Ensure aging tickets are actively worked on;
- Identify tickets when the issue is deemed as a defect or change request and properly notify user; and
- Coordinate activities between COR, ACOR, OB, and external help desks.

3.3.3.3 Optional Documentation Support

The contractor shall develop complete documentation on systems developed or modified. This documentation will consist of a Technical Manual detailing the technical aspects of the system for use by future programmers in maintaining, upgrading and modifying the system and Standard Operating Procedures (SOPs). In addition, the system's program code shall be fully documented and provided to the EPA COR, ACOR, and CO electronically. The contractor will develop System Lifecycle support documents. To provide assistance to users, the contractor shall develop and maintain User's Manuals and on-line help. The User's Manual shall completely address each aspect of the system functions from the users' perspective. It will be developed using a step-by-step instruction approach designed to support both new and experienced system users. Agile methodologies used to support the project shall be developed and kept up to date at all times. The Contractor shall attend meetings, develop meeting minutes, create documents that outline issues or recommendations, prepares Standard Operating Procedures (SOPs) related to the project.

3.3.3.4 Optional – New Data Warehouses or Data Marts

The contractor shall support the development of data warehouses or data marts to support budget, finance, performance, and other administrative reporting needs. Warehouses and marts may be relational or multi-dimensional databases. Data warehousing support includes the process of populating data warehouses or marts with data from other administrative systems using extract/transform/load (ETL) tools. The contractor shall also assist in creating/maintaining reporting environments related to the data warehouses and marts.

3.3.3.5 Optional Training Support

The contractor shall train agency employees on systems that are developed or modified. The contractor shall develop training courses and materials as well as provide instructors. While the contractor shall present information concerning the subject matter, all interpretation of policies, guidance, or other materials will be directed to EPA representatives.

In developing a training course, the contractor shall provide materials that document the information being conveyed in succinct, concise form, including references to the location of additional, detailed information. Where appropriate, the contractor shall conduct hands-on sessions designed to have participants conduct exercises. This will improve understanding and shorten the learning curve. The contractor shall provide a "Train the Trainer Manual" that includes the answers to the exercises in order to permit participants to train additional personnel themselves.

Budget Formulation CPIC

Initiative Definition BY20

Initiative Definition BY20

Template Name BY2020

Is this investment a consolidated business case? No

Consolidated Business Case Parent Investment(s)

Investment Name BFS - Budget Formulation System

Investment Revision Number 32

Point of Contact Chin, Derek

Revision Comment

Class IT

Descriptive Information BY20

UPI Information BY20

Agency Environmental Protection Agency

Bureau Office Of The Chief Financial Officer

EPA Investment Category/Type Medium

Change in Investment Status Identifier No Change in Status

Agency description of change in investment status

Name of this Investment BFS - Budget Formulation System

Full UPI/UII Code 020-000010070 00-00-02-16-02-00

Unique Investment Identifier 9 Digit Code 000010070

Shared Services Category 00

Shared Services Identifier

Mission Support Investment Category Other

Part of Agency IT Portfolio Summary IT Investments for Mission Support Systems

Standard IT Infrastructure and Management Category Not Applicable

OMB Major Mission Area Multi-Goal IT Investments

OMB Investment Type 02 - Non-Major IT Investment

National Security Systems Identifier Non-National Security System Investment

Previous (UII) (12 digits required for all legacy investments) 020-000010070 00-00-01-01-02-00

OMB Short Description Budget Formulation System (BFS) formerly titled New Budget Formulation System (NBFS) will be EPA's future budgeting system . Budget Automation System (formerly titled Budget Formulation System) is EPA's current budgeting system. Development began in 2014.

EPA IT Project Code BD

In which year did or will this investment begin? (Specify year - e.g., 2013)? 2014

In which year will this investment reach the end of its estimated useful life? (specify year - e.g., 2021) 2030

Alignment to IT/IM Strategic Plan Initiatives:

The IT/IM Strategic Plan is an EPA-wide strategy that focuses on the strategic enterprise-wide needs that align with the administrator's priorities. The CIO SAC defined seven IT/IM Initiatives to help advance the strategy and drive change towards achieving the IT/IM Goal Statement. The CIO SAC is working to align Federal Information Technology Acquisition Reform Act (FITARA) and Capital Planning and Investment Control (CPIC) reviews with the Initiatives.

Initiative Priority	IT IM Strategic Initiatives
1 (required)	2. Modernize EPA'S IT/IM infrastructure, applications and services
2 (optional)	
3 (optional)	

Provide the initiatives, goals or milestones that this investment plans to achieve in BY20.

The goal of the investment in BY20 is to provide performance data for the Performance Dashboard.

Additional IT Portfolio Questions BY20

Data Center ID Table: The unique identifier (or list of the identifiers) from your agency's data center inventory, which is submitted to OMB on a quarterly basis in conjunction with the Integrated Data Collection (IDC).

Data Center ID

Data Center ID	Description
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Functional/Business Sponsor Name David Bloom

Functional/Business Sponsor Title Deputy CFO

Functional/Business Sponsor Phone Number 2025641151

Functional/Business Sponsor Phone Number Extension

Functional/Business Sponsor Email bloom.david@epa.gov

BRM Mappings BY20

Primary BRM Mapping (FEA BRM v3.1) 101-Budget Formulation

Secondary BRM Mapping #1 (FEA BRM v3.1) 104-Strategic Planning

Secondary BRM Mapping #2 (FEA BRM v3.1)

Secondary BRM Mapping #3 (FEA BRM v3.1)

Secondary BRM Mapping #4 (FEA BRM v3.1)

Financial BY20

Life Cycle Costs BY20

Provide the total estimated life cycle cost for this Investment by completing the following table. All totals represent all IT resources and budgetary sources of funding, consistent with the Agency IT Portfolio Summary. Totals are to be reported in millions of dollars. Variations from planned expenditures will be reflected in the Project Activities Table and the Agile Activities Table in the Major IT Business Case Detail. Federal personnel costs should be included only in the rows designated as "... Govt. FTE costs" and should be excluded from other costs.

For Multi-Agency Investments, this table should include all funding (both managing and partner Agency contributions), and subsequently may not match figures provided in the Agency IT Portfolio Summary.

To the degree possible, the costs associated with the entire life cycle of the Investment should be included in this table. Whether solutions being developed in an agile fashion or other development methodology, for years beyond BY+1, please provide your best estimates for planning purposes, understanding that estimates for out-year spending will be less certain than estimates for BY+1 or earlier.

For lines in the table that ask for changes in your current submission compared to your most recent previous submission, please use the FY 2019 President's Budget as your previous submission. When making comparisons, please ensure that you compare same-year-to-same-year (e.g., the FY18 level for 2018 versus the FY19 level for 2019). Significant changes from the previous submission should be reflected in an updated Investment-level Alternatives Analysis, subject to OMB review.